

Total Addressable Market for a Short-Form Food Discovery App (BiteMap)

1. Young Urban Demographic Size (Ages 18–39, US & Canada)

In the United States, roughly one-third of the population is aged 18–39 (about 94 million people in 2025) ¹. The vast majority of Americans (about **82.9%**) live in metropolitan/urban areas ². This implies **~85 million** young adults (Gen Z and Millennials) in the US are urban dwellers. In Canada, Statistics Canada data show *approximately 7.93 million Millennials* (ages ~25–40) and *6.7 million Gen Z* (ages ~9–24) in 2021 ³ ⁴. Removing minors, Canada has on the order of **10 million** adults age 18–39, and about **81.7%** of Canadians are urbanized ⁵. That yields roughly **~8–9 million** young urban adults in Canada. **In total, on the order of ~93–94 million** Gen Z/Millennial individuals in the US + Canada live in urban areas (our target market base).

2. Use of TikTok/Reels/Shorts for Food Discovery

Short-form video is a major channel for restaurant discovery among this cohort. According to Google's internal research, **"almost 40%" of young people (ages 18–24)** turn to TikTok or Instagram (Reels) when searching for a place to eat, *instead of* Google Maps or Search ⁶. In other words, a huge share of Gen Z now uses social video apps as their go-to search tool for restaurants. Surveys back this trend: an industry study finds **41% of 18–24-year-olds** and **23% of 25–34-year-olds** use TikTok specifically to discover new restaurants ⁷. (By comparison, older Millennials in their late 30s likely use these slightly less, but still double-digit percentages.) In total, this suggests **tens of millions** of young adults regularly find dining ideas via TikTok, Instagram Reels or YouTube Shorts – roughly 30% of the ~90+ million person segment, or on the order of **~25–30 million** individuals. Indeed, a recent 2025 survey found **73% of Gen Z/Millennial consumers had visited a restaurant in the past 3 months because of a social media post/review** by a food creator ⁸, underscoring how influential short-form social content has become in guiding dining decisions.

3. Annual Restaurant Spending per User (Young Urban Adults)

Young urban adults are significant spenders on dining out. U.S. Bureau of Labor Statistics data indicate Millennials spend about **\$3,455 per year** on food away from home on average, while Gen Z averages around **\$2,483 per year** ⁹. (Gen X spends even more, for context, but our focus is 18–39.) For our target segment of urban Gen Z/Millennial diners – who tend to be very social and food-oriented – an annual spend in the **\$2,500–\$3,500 per person** range is a reasonable estimate. For instance, Millennials were estimated to devote about **13% of their income** to eating out ¹⁰, and Americans overall spend roughly **\$166 per month per person** dining out (≈\$2,000/yr) on average ¹¹ – with younger city-dwellers likely at the higher end of the scale. We will use **~\$3,000 per year** as a representative **average restaurant spend per user** in this cohort, to be conservative (many will spend more, especially those who frequently try new hotspots). This figure is in line with the BLS data and reflects the high dining frequency of urban Gen Z/Millennials (e.g. Gen Z eats out slightly more often than Millennials, though at lower cost venues ⁹).

4. BiteMap's TAM: Food Spend Influenced by Short-Form Content

Based on the above inputs, we can estimate BiteMap's Total Addressable Market in dollar terms as the annual restaurant spending of those consumers *influenced by short-form creator content*. We have approximately **25–30 million** young urban adults in the US & Canada who regularly use TikTok/Reels/Shorts for restaurant discovery (the core user base). If each such user spends on the order of **\$3,000 per year** on restaurants, that equates to roughly **\$75–\$90 billion** in annual dining expenditure. For a ballpark calculation:

- *US*: ~85 million urban 18–39 × ~30% using short-form = ~25.5 million users; at ~\$3k each ≈ **\$76.5 billion** yearly.
- *Canada*: ~8.5 million urban 18–39 × ~30% = ~2.6 million users; at ~\$3k each ≈ **\$7.8 billion** yearly.

Combined, this yields on the order of ~\$84–\$85 billion per year in restaurant spending that is guided or influenced by short-form video content (viral food finds, creator reviews, etc.). In other words, *BiteMap's real TAM* – the annual food-service dollars potentially swayed by short-form creators – is in the **\$80–\$90 billion** range in North America. This represents the sizable revenue pool that a food discovery platform tapping into TikTok/Reels-style content could aim to capture or facilitate. All the above figures are grounded in recent demographic, social media, and consumer spending data, as cited.

Sources: Recent census data and population estimates for US and Canada ² ⁵ ¹ ³ ; surveys on Gen Z/Millennial social media behavior (Google, TechCrunch, Belle Communication) ⁶ ⁷ ⁸ ; consumer spending statistics (BLS, Investopedia) ⁹ ¹¹ . These data points underpin each assumption in the TAM computation. The final TAM estimate (~\$85B/year) is derived from the product of the number of young urban users influenced by short-form content and their average annual dine-out expenditures. Each component of this estimate is referenced from credible sources as detailed above.

¹ US demographics 2025 - StatisticsTimes.com

<https://statisticstimes.com/demographics/country/us-demographics.php>

² ⁵ Urbanization - The World Factbook

<https://www.cia.gov/the-world-factbook/about/archives/2021/field/urbanization>

³ ⁴ A generational portrait of Canada's aging population from the 2021 Census

<https://www12.statcan.gc.ca/census-recensement/2021/as-sa/98-200-x/2021003/98-200-x2021003-eng.cfm>

⁶ Google exec suggests Instagram and TikTok are eating into Google's core products, Search and Maps | TechCrunch

<https://techcrunch.com/2022/07/12/google-exec-suggests-instagram-and-tiktok-are-eating-into-googles-core-products-search-and-maps/>

⁷ Restaurant Social Media Statistics [2025]: Trends Shaping the Industry

<https://cropink.com/restaurant-social-media-statistics>

⁸ Social media drives Gen Z, Millennial dining decisions

<https://www.nrn.com/marketing-branding/73-of-millennials-and-gen-z-let-social-media-guide-their-restaurant-choices>

⁹ Millennials vs. Gen Z: Who Spends More on Dining Out?

<https://www.investopedia.com/millennials-vs-gen-z-dining-out-spending-8754332>

10 Millennials make up nearly a third of restaurants' revenue - News

<https://www.thecaterer.com/news/news/millennials-make-up-nearly-a-third-of-restaurants-revenue>

11 How Americans Are Spending on Restaurants and Takeout - Escoffier

<https://www.escoffier.edu/blog/world-food-drink/consumer-dining-trend-statistics/>